

TaiRox Productivity Tools User Guide

Extended Ship-Via Codes - Summary

Extended Ship-Via Codes provides a mechanism for maintaining ship-via codes for orders across multiple Sage 300 companies. Access is through a Copy Ship-Via Codes button that has been added to the core O/E setup form. Codes and companies can be filtered and cherry-picked. A full log of changed codes is maintained.

Access to Google Maps and email clients is provided on the extended form.

Extended Ship-Via Codes - Overview

Extended Item Pricing operates from within an existing ("source") company. When the Copy Ship-Via Codes button is pressed, a window will pop up that allows filtering of codes in that source company. The filtered codes will be shown and can be selected or de-selected on an individual basis.

Pressing the Copy button on the pop-up window pop-ups up a list of ("target") companies to which those codes can be copied. The companies can be selected or de-selected on an individual basis. The operation to be performed (Insert Only, Update Only, Insert and Update) should be selected. Pressing the OK button will start the copy operation, first asking for an ADMIN user's password. This password entry provides a security checkpoint and insures that there will be sufficient rights to complete the operation. When the copy is complete the log may be reviewed by pressing the Log button.

Sage 300 business objects are used to perform the copying. Illegal copy operations are therefore blocked and errors placed in the log file. When no changes are required for a selected code, there is no update performed - so the audit stamp is preserved.

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Extended Ship-Via Codes

When launched, Extended Ship-Via Codes displays the core Sage 300 entry window with several additional buttons. The Address and Email buttons can be used to link to Google Maps or an email client. The "Copy Ship-Via Codes" button can be used to copy ship-via information to multiple companies.

PTDEMO - Extended Ship-Via Codes

File Help O/E Ship-Via Codes

Ship-Via Code CCT

Ship-Via | Contact

Name Cross Country Trucking Lines

Address #404
6789 Terminal Road

City Vancouver

State/Province BC

Zip/Postal Code V2D3S7

Country Canada

Telephone (604) 555-4444

Fax (604) 555-4444

E-mail

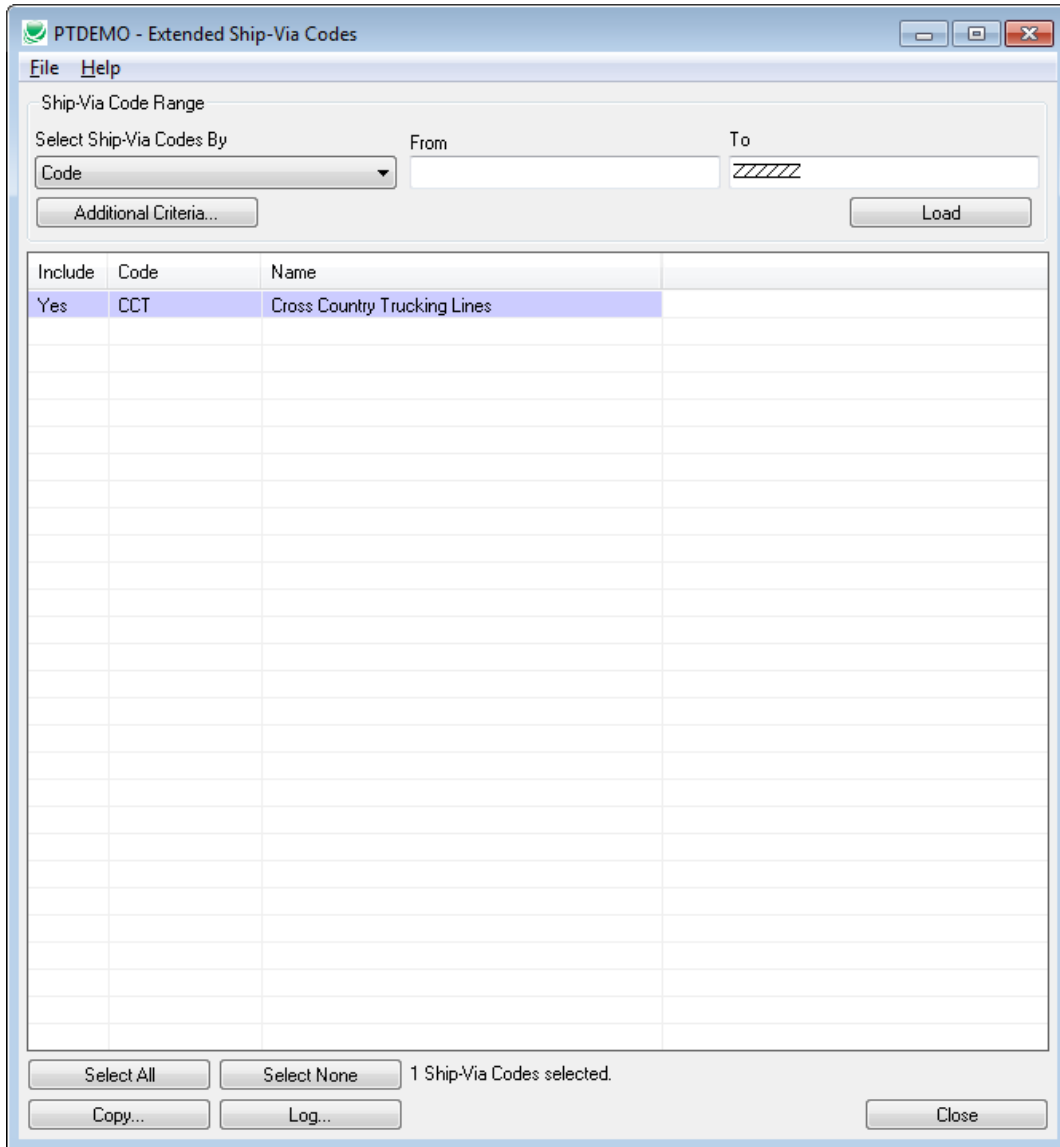
Comment Next day pickup

Save Delete Copy Ship-Via Codes... Close

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Extended Ship-Via Codes - Copy Ship-Via Information

When the Copy Ship-Via Codes button is pressed, the following pop-up is displayed. Note that codes that have been just added or modified will be displayed in the grid - in our illustration, the Cross Country Trucking Lines code whose address we've changed is displayed.

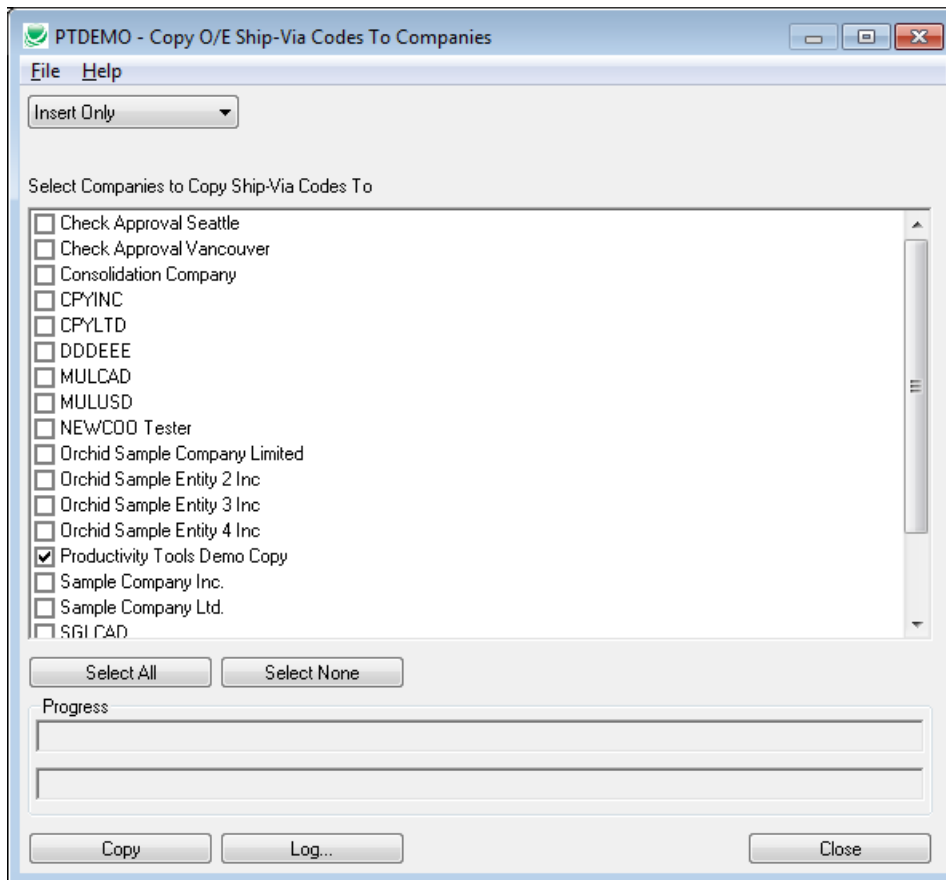


Rather than copying the changed code, any set of codes can be changed by selecting a range of codes and clicking on Load. Pressing the Copy button will continue to the next step - selecting companies.

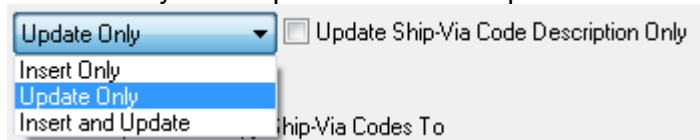
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Extended Ship-Via Codes - Copy Ship-Via Information

This is the window from which companies can be selected.



Important Note: Before proceeding, decide which operation is to be performed. This is controlled by the drop-down and the top of the form:



Operation to be Performed:

- Insert Only operation will only add codes, if the code does not already exist.
- Update Only operation will only update codes that do exist.
- Insert and Update will perform both of these operations.

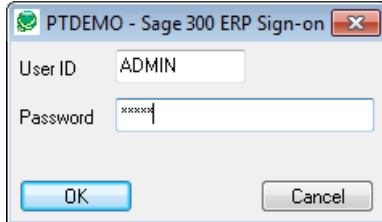
A checkbox can be used so that updating descriptions can be done quickly and safely.

Pressing the OK button will continue to the next step - entering credentials.

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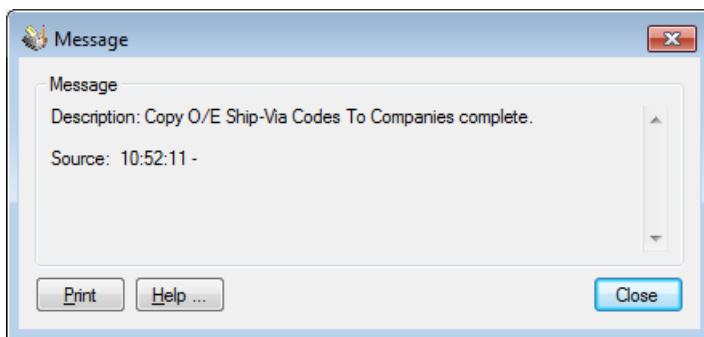
Extended Ship-Via Codes - Copy Ship-Via Information

After pressing OK, you will be asked for a User Id and Password. Make sure the user has sufficient rights to complete the operation. Before continuing, you should check that a current backup exists for the databases being affected or that the operation being requested is limited in nature.



Progress is displayed. The operation can be cancelled - if so operations will be partially complete and an assessment of the situation should take place before further work is done. A log of operations performed (or not performed) is available from the Log button.

Completion of the operation without errors or warnings will be signaled by this window:



A log file records the operations that were performed or not performed:

